

Supplier Conversations Overview

Cardinal allows you to track ongoing discussions and conversations with supplier contacts. You can log the details about procurement, invoice, and payment issues that you are trying to resolve as well as document supplier inquiries by using the **Supplier Conversation** page.

Only users with the **Supplier Conversation Processor** roles can make updates to this page.

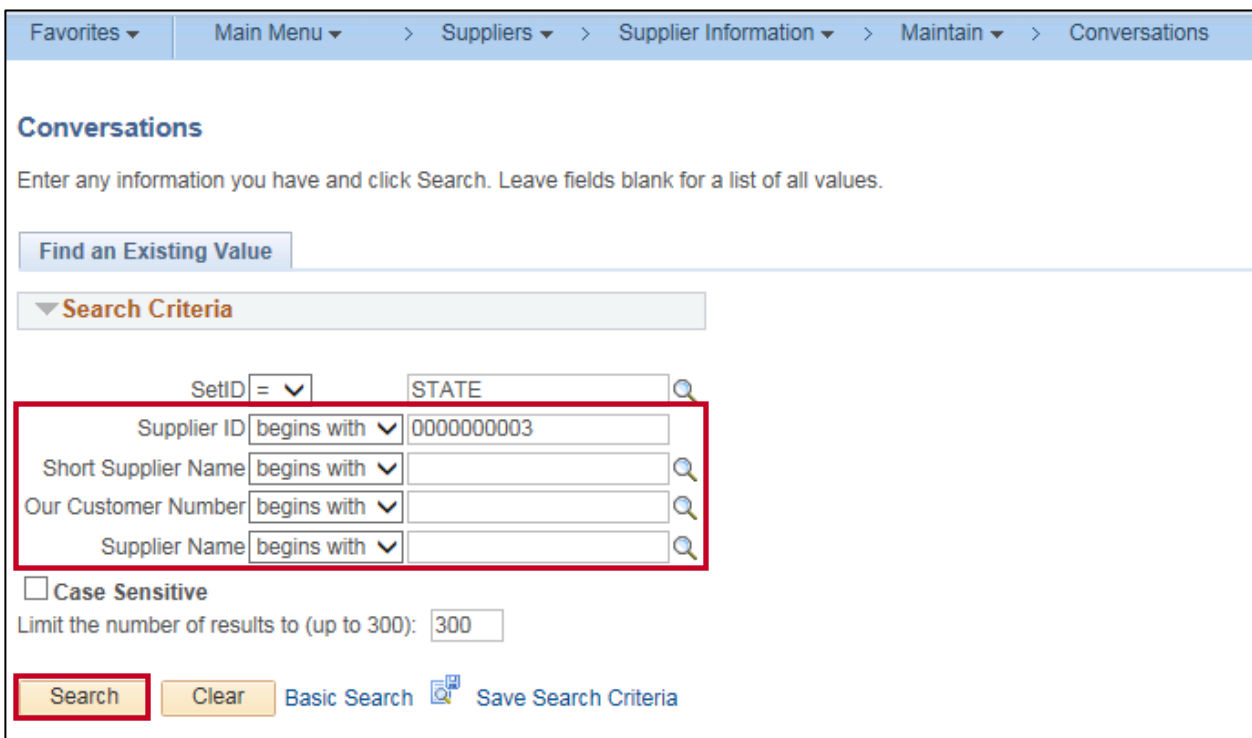
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Record a Supplier Conversation

1. Navigate to the **Conversations** page using the following path:

Main Menu > Suppliers > Supplier Information > Maintain > Conversations



2. Enter search criteria for the desired supplier. For this example, **Supplier ID** is entered.
3. Click the **Search** button.

If a Search Results list displays, click the line to select the desired supplier.

[Favorites](#) > [Main Menu](#) > [Suppliers](#) > [Supplier Information](#) > [Maintain](#) > [Conversations](#)

Supplier Conversation

SetID STATE Supplier ID 0000000003 Aspect Software

Conversation [Find](#) | [View All](#) First 1 of 1 Last

*Date 11/25/2014 User ID IRR54350

Contact Conversation Sequence Number 1

Topic W9

Descr 11/25/14 D. CHOICE W9 UPLOADED.

Keywords

W9 CONFIRM

Review

Review Date

Review Days

Next Review Date

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#)

- The **Supplier Conversation** page displays. If a message displays, click the (+) to add a new message.

Favorites ▾ Main Menu ▾ > Suppliers ▾ > Supplier Information ▾ > Maintain ▾ > Conversations

Supplier Conversation

SetID STATE Supplier ID 000000003 Aspect Software

Conversation Find | View All First 2 of 2 Last

*Date 11/21/2016 User ID PPS1 ANGELA.GRAY

Contact 1 Karen McPherson Conversation Sequence Number 2

Topic Modify Software Request

Descr Called Karen McPherson and changed to the software request to add an additional license.

Keywords

Review

Review Date

Review Days

Next Review Date

Save Return to Search Notify Refresh

5. The **Date** fields populates with the current date.
6. The **User ID** defaults based on your Cardinal User ID.
7. In the **Contact** field, enter the ID for the supplier contact with whom you spoke. (Use the **Look Up Contact** icon if needed.)
8. In the **Topic** field, enter a brief (up to 30 characters) description of the topic you discussed if desired.
9. In the **Descr** field, enter a detailed description of the conversation. Make sure to include any agreements or conclusions that you reached.
10. In the **Keywords** section, select one or more keywords from the drop-down list(s) to identify the conversation if desired. This makes it easier to locate the conversation later.
11. If you want to review the conversation later (e.g., to follow up with the supplier if needed), complete the fields in the **Review** section as desired. You can enter a **Review Date**, the number of **Review Days** from today, and/or a **Next Review Date**. These fields are for your information only.
12. Click the **Save** button.